



Location	San Diego, CA, USA
Industry	Education
Employees	1,000+
Use case	Onboarding

“We took a ‘white glove’ approach and set up an internal champions program, offering onboarding and training services tailored to each department.”



Peyri Herrera
Sr. Director, Enterprise Project Management Office
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The challenge

The San Diego County Office of Education (SDCOE) supports nearly 780 schools and more than 500,000 students across California's San Diego County. The Integrated Technology Services (ITS) division, with nearly 115 staff, completes numerous projects and initiatives annually to support the organization's mission: to inspire and lead innovation in education.

SDCOE's ITS division faced a handful of challenges regarding managing all of its projects. These included:

- The Assistant Superintendent & Chief Information Officer and senior leadership team did not have visibility of the projects within the division.
- Several teams used different tools and applications to manage projects, and no one had access to the tasks except the project manager.
- It was challenging to communicate and collaborate effectively, especially on large-scale initiatives involving numerous staff across multiple departments.

SDCOE ITS selected monday.com Work OS because it is easy to use, flexible, and would help improve visibility, efficiency, collaboration, and communication.

The solution

SDCOE's Enterprise Project Management Office (EPMO) planned and executed the rollout of monday.com Work OS, and knew that organizational change management would be important for adoption across the entire ITS division.

They used the following strategies:

Leadership support. The support and backing of the senior leadership team helped set expectations—leaders modeled how to incorporate monday.com Work OS into existing business procedures.

Customized training. The EPMO worked with senior leadership to determine a standardized template that the entire division could use for projects, complete with a roll-up board and CIO dashboard. Then they developed customized training, job aids, and instructional videos and conducted training for each department within the division.

Champions program. The EPMO set up a monday.com 'champions' program, with two representatives from each department to help lead the charge. The champions received training first, attended the Elevate Conference, and served as the key staff to help train their staff, answer their department's questions, and find better ways to work. The monday.com champions ensured employees had the resources and information needed to use the new software successfully with a personal touch on the rollout.

Ongoing support. The champions continue to work with their departments throughout the year, identifying new training needs and providing follow-up training and knowledge transfer.

The impact

The extensive training and support services paid off – SDCOE ITS realized a successful adoption of monday.com Work OS.

With everyone on one uniform platform, they now have a cost effective solution they can rely on.

SDCOE’s EPMO team conducted a survey to evaluate the platform’s impact. 76 people responded and noted the following as the top benefits:

- **Improved communication. 90% agreed that monday.com Work OS has improved project communication.**
- **Improved tracking. 89% agreed that project tracking has improved.**
- **Improved collaboration. 87% agreed that monday.com Work OS has improved project collaboration.**

In addition to the survey results, another key benefit noted is that the Assistant Superintendent & Chief Information Officer is now able to see the entire project portfolio and the progress of each initiative at a high level.

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The champions
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